DOCUMENT RESUME

ED 146 193 TM 006 566

TITLE	Evaluation Guidelines for School Personnel. Suggested Personnel Guidelines for School Districts. Revised.
INSTITUTION	Oregon State Dept. of Education, Salem. Div. of Administrative Support.
PUB DATE	May 77
NOTE	31p.
EDRS PRICE	MF-$0.83 HC-$2.06 Plus Postage.
DESCRIPTORS	Elementary Secondary Education; Evaluation Methods; *Guidelines; *Personnel Evaluation; *Personnel Management; Records (Forms); School Administration; School Districts; *School Personnel; Standards; *Teacher Evaluation
IDENTIFIERS	Oregon

ABSTRACT

These guidelines were developed to update the original Teacher Performance Evaluation Procedures instituted by the Personnel Management Advisory Committe in 1971 and to comply with Oregon law. They are intended to aid local school districts in developing their own staff evaluation procedures and documents. Examples of evaluation forms for certificated and classified employees are included. (Author/MV)

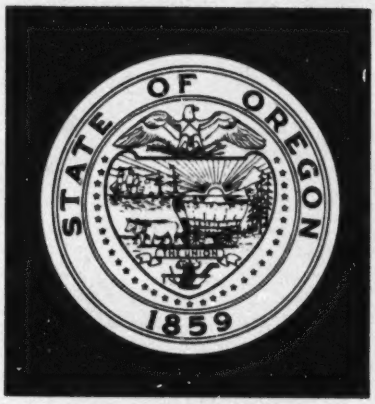
****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED146193

SUGGESTED PERSONNEL GUIDELINES FOR SCHOOL DISTRICTS

EVALUATION GUIDELINES FOR SCHOOL PERSONNEL

department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education



department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education
department of education

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Rob Fussell,
Oregon Dept. of Education

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

DIVISION OF
ADMINISTRATIVE SUPPORT
OREGON DEPARTMENT OF EDUCATION
942 LANCASTER DRIVE NE.
SALEM, OREGON 97310
VERNE A. DUNCAN, STATE SUPERINTENDENT
OF PUBLIC INSTRUCTION

TM006 566

SUGGESTED PERSONNEL GUIDELINES

FOR SCHOOL DISTRICTS

EVALUATION GUIDELINES FOR SCHOOL PERSONNEL

Verne A. Duncan
State Superintendent of Public Instruction

Milt Baum
Associate Superintendent
Division of School Management Services

Don Kipp
Director
Accreditation, Legal and Personnel Services

Oregon Department of Education
942 Lancaster Drive NE
Salem, Oregon 97310

April 1975
Revised May 1977

STATEMENT OF ASSURANCE

Oregon Department of Education

It is the policy of the Oregon Department of Education that no person be subjected to discrimination on the basis of race, national origin, religion, sex, age, handicap, or marital status in any program, service, or activity for which the Oregon Department of Education is responsible. The Department will comply with the requirements of state and federal law concerning nondiscrimination and will strive by its actions to enhance the dignity and worth of all persons.

2541119772000

TABLE OF CONTENTS

	Page
Table of Contents	iii
Personnel Management Advisory Committee	iv
Foreword	v
Evaluation Guidelines for School Personnel	1
Certificated Staff	2
Purpose	2
Introduction	2
Administrative Procedures	3
Position Description Review	3
Setting and Reviewing Teacher Goals	4
Personnel Progress and Performance Evaluation	4
Staff Performance Evaluation	5
Plan of Assistance	6
Change of Status	6
SPECIAL NOTE: Public School Coach	7
Classified Staff	8
Purpose	8
Introduction	8
Suggestions for Evaluation	9
Administrative Procedures	11
Position Description Review	11
Personnel Performance Evaluation	11
Plan of Assistance	12
Change of Status	13
Forms	15

PERSONNEL MANAGEMENT ADVISORY COMMITTEE

Eugene Allison
Intermediate Education District

Milt Baum
Oregon Department of Education

Joe Benninghoff
Oregon Association of School Personnel Administrators

Al Bigler, Vice-Chairman
Oregon School Employees Association

Cliff Brush
Oregon Federation of Teachers

Lucille Dickey, Chairperson
Small Districts

Chris Dudley
Oregon School Boards Association

Franci[illegible] Dummer
District Superintendent

Henry [illegible]
Assistant Superintendent

Gerald Hamann
Metro Districts

John Heilbronner
Oregon Association of Classroom Teachers

Mary Henderson
Portland

Curt Huey
Lower Mid-Willamette Valley

Don Kipp
Oregon Department of Education

Jack Liles
Oregon Community College Assembly

George Martin
Oregon Department of Education

Henry Mascall
Teacher Standards and Practices Commission

Tony Palermini
Metro Districts

Lee Wells
Oregon Department of Education

Subcommittee on Suggested Personnel Guidelines for School Districts

John Heilbronner, Chairman
Al Bigler
Cliff Brush
George Martin

FOREWORD

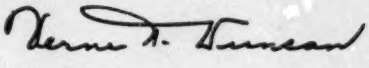
These guidelines were developed to update the original Teacher Performance Evaluation Procedures by the Personnel Management Advisory Committee (1971), and to comply with Oregon Law. Its purpose is to help local districts deal fairly with all employees and develop an early warning system. The revision updates the evaluation process to include changes and events that have taken place in the past two years.

The Personnel Management Advisory Committee strongly recommends that every Oregon school district carefully and annually review its personnel policies. The scope of the evaluation procedure should include all school personnel. These materials are organized in two parts--the first for certificated staff and the second for classified personnel.

Please note that the teacher position description evaluation as suggested in this document is not included and, if used, is prepared by the local school district.

These guidelines are suggestions only. Each district must develop its own staff evaluation procedures and documents. Included are examples of evaluation forms for certificated and classified employees; the forms should be adapted to the local school district philosophy, goals, and objectives.

The Personnel Management Advisory Committee is interested in your comments to improve and update this and other Personnel Management Advisory publications. If you have questions or suggestions regarding this publication, please contact Don Kipp, 378-4041.



Verne A. Duncan
State Superintendent of
Public Instruction

May 1977

EVALUATION GUIDELINES FOR SCHOOL PERSONNEL

One of the most important responsibilities of a school administrator is the district's staff improvement program. The major purpose of an evaluation should be to improve district services to students, staff and community.

Performance evaluation is an essential part of staff development and service improvement; it creates a better understanding between employer and employee. Only through periodic evaluations can the supervisor identify strengths that should be encouraged or weaknesses that require attention. Evaluation will also help the supervisor recognize employee potential for advancement.

Employees should know where they stand with respect to job performance. Superior employees want recognition for outstanding work, and all staff members need to know how to improve. The evaluation should be fair and conducted positively to provide a sense of satisfaction to employees exceeding performance standards, and to identify both employees who meet performance standards and those who need improvement.

There will be a few employees who will require special help to improve performance, or who should be dismissed; these pages suggest ways to manage these situations.

This publication presents <u>suggested</u> <u>guidelines</u> for district administrators to help staff members to effectively serve the district. Attention is given to both the certificated staff (pages 2-7) and classified staff (pages 8-13).

CERTIFICATED STAFF

Purpose

The primary goal of staff evaluation should be to improve performance to assist the student's learning process. A second goal is to determine the conditions for continued employment of staff.

Oregon Revised Statute (ORS) 342.850 requires an annual evaluation of each employee.

The 1973 Guidelines and Model Policies, part of the series of suggested personnel policy guidelines for school districts, Oregon State Board of Education, describes the Oregon laws and regulations relating to staff evaluation. (This is in the process of revision.)

INTRODUCTION

The Oregon Fair Dismissal Law (ORS 342.805 through 342.930) and various court rulings suggest the methods by which employees may be terminated. While probationary teachers are not provided the same protection as permanent employees of school districts, good professional practice and consideration for the rights of individuals call for fairness in all actions involving district personnel.

Every effort should be made to keep employees informed of their status at all times. It is important that teachers be notified as soon as possible when service is less than satisfactory, and a plan of assistance immediately

developed. Certificated staff facing dismissal or nonrenewal of contract should be informed in writing of the conditions, if any, for continued employment.

School boards with legal advice, should adopt policies and procedures regarding district staff evaluations.

ADMINISTRATIVE PROCEDURES

The following are not policies

Position Description Review*

Position descriptions for all certificated staff members of the district should be discussed at the end of the school year, or as needed. This discussion should include a review of the position and performance in terms of the official district position description. The description may be modified or otherwise used to determine staff goals for the next year. This review should be completed on or before the last day of school.

All performance evaluations should be based on the district position description and employee personal objectives. A cooperative approach between immediate supervisor and employee is expected. The preliminary Personnel Progress and Performance Evaluation Report may be subjective in nature, based on a list of specific acts, omissions or weaknesses, and strengths in teaching skills and/or strategies. The district should develop and regularly use written performance standards.

Annual written evaluations should be specific, using observable data.

* The development of position descriptions is described in Position Descriptions, one of the series, "Suggested Personnel Policy Guidelines for School Districts," by the Personnel Management Advisory Committee, 1975.

Setting and Reviewing Teacher Goals

Employee and supervisor, together, should annually prepare individual written performance goals as directed, based upon district standards and on assessment of current status and improvement needs.

The certificated staff member should discuss written performance goals with the immediate supervisor and both agree on the checkpoint dates.

Employees new to the district should complete this assignment prior to the end of the first month of school, and those returning should do so at the last evaluation conference of the previous year, or as otherwise requested. In the event of disagreement, the supervisor should establish goals, noting the employee's disagreement, and provide for the implementation of written performance goals.

The supervisor and employee should determine the degree of goal attainment at each checkpoint, or as otherwise requested. After review of the present level of attainment, revised or new goals should be developed by the staff member and supervisor. Setting and reviewing individual goals provides the basis for regular evaluations of employee improvement and professional activities.

Personnel Progress and Performance Evaluation

A Personnel Progress and Performance Evaluation Report form should be developed and adopted by the district to be used as a part of the staff evaluation process.

The Personnel Progress and Performance Evaluation Report should be completed for all new employees, and for probationary and permanent employees who are having difficulties in achieving identified goals.

The report should be completed whenever and as often as needed.

The report should be prepared on Form (A), Personnel Progress and Performance Evaluation Report, similar to the sample on page 17.

Goal setting and review should be carried out as part of this appraisal.

Staff Performance Evaluation

The Staff Performance Evaluation should be prepared annually for all certificated staff in the district below the rank of assistant superintendent, as required by state law.

The evaluation should be completed each year, in a timely manner, so as to provide assistance for personnel who are experiencing difficulties. The evaluation must include a conference between the staff member and immediate supervisors, with both parties signing the report.

The Staff Performance Evaluation must be prepared on Form (B), Oregon Board of Education Form Number 81-581-1231 (see page 19), or as it may be revised, and it may be used with other forms developed by the district.

Goals should be reviewed and set as part of this appraisal.

Plan of Assistance

There may be a time when it is found that teaching effectiveness is below standards of the district. It is desirable at that time to develop a Plan of Assistance.

The Plan of Assistance should include an objective analysis of observable difficulties and a statement of immediate goals designed to overcome these difficulties. The plan should include a checkpoint schedule and be signed by the employee and supervisor.

The plan may be the reassignment, now or at a later date, to a different school, grade level, subject or other activity designed to help the employee provide satisfactory service. The plan may involve a variety of other activities, such as observation of peers, the assistance of district resource persons, participation in in-service programs, or academic study.

The plan should be reported on Form (C), Plan of Assistance similar to the sample on page 20. The review called for at the checkpoint(s) should be carried out and a revised plan and additional checkpoints developed as needed.

Change of Status

If it is found that a staff member working under a Plan of Assistance is unable or unwilling to plan and carry out a program of improvement sufficient to meet personal or district performance standards, the employee should be informed that further efforts to provide assistance or to monitor the progress of the employee may be used as evidence in dismissal action in addition

to the evaluations and other documents which have been previously placed in writing.

This action and these suggestions should be carried out with legal advice. This intent should be reported to the employee on Form (D), Change of Evaluation Status, similar to the sample on page 22, and delivered personally to the employee in triplicate, one copy to be signed by the employee and supervisor and placed in the individual's file.

Additional efforts should be made to help the employee improve so employment may be continued.

The employee should be informed through Form (D), or otherwise in writing, of the date of nonrenewal or dismissal, and the reasons. Reference should be made to the appropriate laws and regulations, and the employee should be informed of any available options.

SPECIAL NOTE: A new category of certificated employee has recently appeared--the public school coach. The standards for this type of certificate have been set by the Teacher Standards and Practices Commission (TSPC). It is the recommendation of the Personnel Management Advisory Committee that these employees be given position descriptions, assistance in achieving adequate preparation and performance, and evaluated by processes outlined above.

CLASSIFIED STAFF

PURPOSE

The primary goal of the classified employees performance evaluation is to improve services. A second goal is to determine the conditions for continued employment. Evaluation procedures should be included in the overall personnel management program of the school district.

The 1973 Guidelines and Model Policies, part of the series, "Suggested Personnel Policy Guidelines for School Districts" prepared by the Oregon Department of Education, recommend that classified employees be evaluated at least annually.

INTRODUCTION

Oregon laws and various court rulings provide protection for state employees. While classified staff members do not have the same degree of protection as certificated school district employees, good practice and consideration for the rights of individuals calls for fairness in all personnel actions.

Good personnel practices provide that all employees are informed of their performance status at all times. It is important that superior performance be recognized. It is also important that employees be notified as soon as possible when service to the district is not satisfactory. Employees facing dismissal should be informed of the conditions for continued employment, if any. Employees that will not be retained the following year should be informed in writing, as suggested by legal advice.

SUGGESTIONS FOR EVALUATION

[The following are not policies]

This section will help school boards and administrators plan an effective evaluation procedure for classified employees. This document, with legal advice, may be used to help district boards develop these policies and to formally adopt their own language for local use. It is extremely important that school boards and administrators follow the policies they adopt.

The evaluation conference between supervisor and employee is an important element of the district's personnel program relating to job growth and staff development. During this conference it is essential that the supervisor demonstrate managerial and leadership qualities, and empathy and understanding. Indicated below are several supervisory principles which will lead to a more effective conference:

The employee should understand the full scope of the duties and responsibilities of the job. (See position descriptions below.)

The evaluation should be fair. The supervisor, at the evaluation conference, should attempt to:

a. Create a friendly and cooperative atmosphere so as to reduce tension or anxiety on the part of the employee.

b. Emphasize that the conference is a constructive and cooperative process to provide help for job growth and career development.

c. Be sincere in praising outstanding performance, and be fair and firm in discussing performance that is less than satisfactory.

d. Be sure the employee understands opportunities available for training and job growth.

The district must insure confidentiality of evaluation.

Employees performing unsatisfactorily in any area evaluated should fully understand what needs to be done to improve performance, and be given sufficient time and help to do so.

While the primary purpose of the evaluation is to improve service, there may be instances where the employee, for some reason or another, may not be able to improve performance to a satisfactory level, making dismissal necessary. The district administrator should provide the procedures to be followed in this situation.

ADMINISTRATIVE PROCEDURES

[The following are not policies]

Position Description Review

Position descriptions and performance standards for all employees of the district should be reviewed at the start of employment and otherwise as needed. The description may be used to determine staff goals for the next year.

A position description identifies the major duties and responsibilities that will be performed. A performance standard identifies how those duties are to be performed.

All evaluations are based on the district position description and job performance standards. A cooperative approach between immediate supervisor and employee is expected in completing the Position Description Review. The evaluation should be objective, based on a list of specific strengths, omissions or weaknesses in performance which relate to the district's standards or expected competencies. Written evaluations should be specific, using observable data.

Personnel Performance Evaluation

The Personnel Progress Evaluation should be a district developed and adopted form used as a part of the staff evaluation process.

The evaluation should be carried out for all new employees within the first six months of initial employment, or earlier if needed, and for other personnel who are not performing satisfactorily.

The report should be completed for all employees whenever needed; it is recommended that it be at least once each school year. Additional checkpoints may be used as necessary.

The report should be prepared on Form (E), Classified Evaluation Report. Samples may be found on pages 23 through 28.

Evaluation reports should be signed by both the employee and the supervisor and become a permanent record in the employee's confidential personnel file. Employees should have the opportunity to respond in writing to evaluation comments on the report.

Plan of Assistance

There may be a time when it is found that performance is below district standards. It may be necessary at that time to develop a Plan of Assistance.

The Plan of Assistance should include an analysis of observable difficulties in meeting district performance standards, and a statement of immediate action to overcome these difficulties as worked out by employee and supervisor. The plan should identify checkpoints and be signed by both employee and supervisor.

The plan may be the reassignment, now or at a later date, to a different school, or other activity designed to help the employee provide satisfactory service.

The plan should be reported on Form (C), Plan of Assistance, similar to the sample on page 21. The review called for at the checkpoint(s) should be carried out and a revised plan with additional checkpoints developed as needed.

Change of Status

A staff member working under a Plan of Assistance may be unable to carry out a program of improvement sufficient to meet district performance standards. It may then be necessary to inform the employee that further efforts to help or checkpoint evaluations may be used as evidence if needed in a dismissal action.

This intent should be reported to the employee on Form (D), Change of Evaluation Status, similar to the sample on page 22, and delivered personally to the employee in triplicate; the signed original is for the individual's personnel file, a copy for the employee, and a copy for the supervisor.

Additional efforts should be made to help the person improve so that employment may be continued. Consideration may be given to assignment to another position as suggested above.

The employee should be informed through Form (D), or otherwise in writing, of the date of dismissal and the reasons. Reference should be made to the appropriate laws and regulations, and the employee informed of any available options.

FORMS

Sample Form (A)

_____SCHOOL DISTRICT

_____, Oregon

PERSONNEL PROGRESS AND PERFORMANCE EVALUATION

Employee_____ School_____

Probationary: 1st Year _____

2nd Year _____

3rd Year _____

Permanent: Years in District _____ Subject or Grade _____

Number of Observations and Follow-up Conferences _____

-- -- -- -- -- -- -- -- -- -- -- -- -- -- --

Degree Goals are Obtained:

Observable Data:

Agreed Upon Follow-Up Activity:

_____	_____	_____
Employee's Signature (Does not necessarily mean agreement but indicates the report has been read and discussed.)	Supervisor's Signature	Date

DUE--No later than November 30

Form B
Complete in triplicate:
Original for Personnel File
Blue Copy for Teacher
Pink Copy for Supervisor

_____ School District No. _____
_____ , Oregon

TEACHER PERFORMANCE EVALUATION

Name _____ Employee Status _____

Assignment _____ School _____

Instructions: *This form is to be completed pursuant to rules adopted by the district school board. It may be supplemented by district forms for a complete evaluation to improve the quality of instruction. The completed evalurtion form shall be delivered to the teacher and one signed copy maintained in the teacher's personnel file.*

"Teacher" means any person who holds a certificate as provided in ORS 342.125 who is employed on other than a part-time basis as an instructor or administrator below the rank of assistant superintendent.

1. In what way has the teacher met, failed to meet, or exceeded the performance goals and objectives during the evaluation period? *(Explain, using the reverse side or additional page(s) as needed.)*

2. In what areas has the teacher shown development and growth in the teaching professions? *(Use the reverse side or additional page(s) as needed.)*

3. In what specific areas does the teacher need to demonstrate additional development and growth? *(Include suggestions for improvement, using the reverse side or additional page(s) as needed.)*

4. Supervisor's recommendations:
   - ☐ Continuation of Employment
   - ☐ Termination of Employment
   - ☐ Other _____

5. Additional comments: *(Use the reverse side or additional page(s) as needed.)*

6. Teacher's response, if desired, as provided by law. *(See over, ORS 342.850 (4).)*

This is to certify that we have read and discussed the above report.

Teacher's Signature	Date	Supervisor's Signature	Date

The following attachments are a part of this report:

Oregon Department of Education
Form No. 1231, Revised 5/77

ORS 342.850 Teacher evaluation; form; personnel file content. (1) The district superintendent of every school district, including superintendents of intermediate education districts, shall cause to have made at least annually an evaluation of performance for each teacher employed by the district in order to allow the teacher and the district to measure the teacher's development and growth in the teaching profession. A form shall be prescribed by the State Board of Education and completed pursuant to rules adopted by the district school board. Except in those districts having an average daily membership as defined in ORS 327.006 of less than 200 students, the person or persons making the evaluations must hold teaching certificates. The evaluation shall be signed by the school official who supervises the teacher and by the teacher. A copy of the evaluation shall be delivered to the teacher.

(2) The annual evaluation reports shall be maintained in the personnel files of the district.

(3) The annual evaluation report shall be placed in the teacher's personnel file only after reasonable notice to the teacher.

(4) A teacher may make a written statement relating to any evaluation, reprimand, charge, action or any matter placed in the teacher's personnel file and such teacher's statement shall be placed in the personnel file.

(5) The personnel file shall be open for inspection by such teacher but shall be open only to such other persons as are officially designated by the board or by the teacher, in accordance with such rules and regulations as the board shall adopt.

Sample Form (C)

_____ School District

_____ Oregon

PLAN OF ASSISTANCE

_____
Date

It has been determined that the employee's performance needs special attention and assistance. The following presents our agreement on these needs and a plan to overcome them.

These performance standards are found to need improvement based upon the following observable conditions:

The employee and supervisor should study the deficient performance and plan a corrective program, which may include:

a. Performance to be improved-

b. A professional growth program designed to bring about this improvement. (This should involve specific statements of things to be done that may be demonstrated by observable data.)

c. Job assignment will be changed on _____ and the performance will show these improvements.
Date

d. Others (be specific)-

The above will be accomplished or noticeble improvement achieved on or before _____, by which time we will have a review conference. We may at that time agree that improvement is satisfactory, or we may wish to set revised or new performance goals leading to further improvement.

_____
Employee's Signature
(Does not necessarily mean agreement, but indicates the report has been read and discussed.)

_____
Supervisor's Signature

Copies: Employee
Supervisor
Employee File

Sample Form (D)

_____ SCHOOL DISTRICT

_____, Oregon

Date _____

TO:

FROM:

SUBJECT: Change of Evaluation Status

This is to advise you that from this date to the completion of your employment, or until another conclusion is reached, the district evaluation procedures will no longer be used solely for the improvement of your services to the district, but also for obtaining and recording information about your continued employment by the district.

Please sign your name here as indication that you have received this document, a copy of which is attached for your use.

Employee's Signature	Supervisor's Signature	Superintendent's Signature

Copies: Employee
Supervisor
Employee's File

SAMPLE FORM (E)

EMPLOYEE EVALUATION REPORT

For Classified Personnel

Employee Name | School or Location | Location No.

Employee Status:
Probation ☐
Part-Time ☐
Regular ☐

If Unscheduled Report
Check Here ☐

Position Title _____ Range _____
Position Code _____ Step _____
Hours Per Day _____ Months Per Year _____

SECTION 1

FACTOR CHECK LIST

Evaluator Must Check Each Factor in the Appropriate Column

A Not Satisfactory	B Requires Improvement	C Meets Standards	D Exceeds Standards	E Does Not Apply	
					1. Observation of Work Hours
					2. Attendance
					3. Grooming and Dress
					4. Compliance with Rules
					5. Safety Practices
					6. Public Relations
					7. Pupil Relations
					8. Employee Relations
					9. Knowledge of Work
					10. Work Judgment
					11. Planning and Organizing
					12. Job Skill Level
					13. Quality of Work
					14. Volume of Acceptable Work
					15. Meeting Deadlines
					16. Accepts Responsibility
					17. Accepts Direction
					18. Accepts Change
					19. Effectiveness Under Stress
					20. Appearance of Work Station
					21. Operation & Care of Equip.
					22. Work Coordination
					23. Initiative
					24. Additional Factors
					25.
					26.
					27.
					28.
					29.
					30.

SECTION 1A

FOR EMPLOYEES who SUPERVISE OTHERS

					31. Planning & Organizing
					32. Scheduling & Coordinating
					33. Training & Instructing
					34. Productivity
					35. Evaluating Subordinates
					36. Judgments & Decisions
					37. Leadership
					38. Operational Economy
					39. Supervisory Control
					40. (Additional Factors)
					41.
					42.
					43.
					44.
					45.

USE INK OR TYPEWRITER IN COMPLETING THIS FORM

SECTION 2 Record job strengths & superior performance incidents

SECTION 3 Record progress achieved in attaining previously set goals for improved work performance.

SECTION 4 Record specific goals or improvement to be undertaken during next evaluation period.

SECTION 5 Record specific work performance deficiencies or job behavior requiring improvement or correction (Col. A)

SECTION 6 SUMMARY EVALUATION & STATUS RECOMMENDATIONS

Check Appropriate Boxes

Not Satisfactory ☐ Requires Improvement ☐ Effective Meets Standards ☐ Exceeds Standards ☐

Termination ☐

Comments:

Evaluators Signature / Position / Date

EMPLOYEE: I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement.

Comment: _____

Employee's Signature Date

Sample Form (E)

Date_____

EMPLOYEE EVALUATION REPORT

NAME_____ DEPT. OR SCHOOL_____

ADDRESS_____ TELEPHONE_____

Rating: 1-Outstanding; 2-Satisfactory; 3-Needs Improvement; 4-Unsatisfactory

	1	2	3	4
Quality of Work				
Quantity of Work				
Personal Appearance, Neatness and Habits				
Health, regularly at work, physically strong				
Dependability				
Punctual, on time				
Cooperates, works well with others				
Follows instructions, seldom makes errors				
Accepts suggestions willingly and cheerfully				
Knowledge of work				
Often sees and does extra work without being told				
Participates in professional development (instructional)				
Loyal to school system and fellow employees				
Industrious, does not shirk				
Takes good care of equipment and supplies				
Accepts and completes work assignments				

Give detailed explanation of any items checked in Column 4; indicate action employee must take to improve performance in each case.

COMMENTS:

_____ _____

Employee Signature Supervisor Signature

_____

Date Signed

Signatures indicate only that the evaluation has been discussed between supervisor and employee.

SAMPLE FORM (E)

EMPLOYEE EVALUATION REPORT

Employee Name	Position	Location

Section 1

1 Unsatisfactory	2 Needs to Improve	3 Meets Expectations	4 Exceeds Expectations	Does not apply	FACTOR CHECK LIST
					Quality of work
					Quantity of work
					Knowledge of work
					Punctuality and attendance
					Compliance with policies
					Safety practices
					Operation & care of equipment
					Judgment
					Initiative
					Dependability
					Public relations
					Staff relations
					Grooming and dress
					Professional development
					Additional factors

Section 2 For Supervisors

					Planning and organizing
					Scheduling & coordinating
					Training & instructing
					Productivity
					Evaluating others
					Judgment and decisions
					Leadership
					Additional factors

Section 3

Specific Job Strengths

Section 4 Weaknesses Requiring Improvement (Explanation of checks in Column No. 1)

Section 5 Evaluator's Recommendation

____ Continue employment with advance in salary

____ Probation continue

____ Terminate employment

This is to certify that we have read and discussed the above report.

_____ Employee

_____ Evaluator

_____ Date

The employee is invited to make any written comments regarding this evaluation. These written comments will be attached to and accompany this evaluation form.

White Copy – Personnel Office
Yellow Copy – Principal
Pink Copy – Employee

SAMPLE FORM (E)

EMPLOYEE EVALUATION REPORT

EMPLOYEE NAME	SCHOOL OR LOCATION	POSITION TITLE

Dates of Evaluation Period: _____ to _____

Employee Status:
Probation ☐
Part-Time ☐
Regular ☐

If Unscheduled Report
Check Here ☐

Position Responsibility _____

Does the employee adequately guard confidential information? _____YES _____NO

SECTION I

FACTOR CHECK LIST

Evaluator Must Check Each Factor in the Appropriate Column

4 Exceeds Expectation	3 Meets Expectation	2 Needs to improve	1 Unsatisfactory	Does Not Apply	
					PERFORMANCE ABILITIES
					Quality of work
					Knowledge of work
					Operation and care of equipment
					Typing Skills
					Shorthand – Machine transcription
					PERSONAL QUALITIES
					Attendance and Punctuality
					Appearance
					Public Relations
					Pupil Relations
					Staff Relations
					OTHER QUALITIES
					Compliance with rules
					Safety practices
					Adaptability
					Initiative
					Dependability

SECTION II — **FOR EMPLOYEES WHO SUPERVISE OTHERS**

					Planning and Organizing
					Scheduling and Coordinating
					Training and Instructing
					Productivity
					Evaluating Others
					Judgment and Decisions
					Leadership
					Additional Factors

Checks in column (1) must be explained in SECTION V.

SECTION III

Record job strengths and superior performance incidents.

SECTION IV

Record progress achieved in attaining previously set goals for improved work performance.

SECTION V

Record specific work performance deficiencies of job behavior requiring improvement or correction.

SECTION VI

Record specific goals of improvement to be undertaken during next evaluation period.

SAMPLE FORM (E) - Continued

EMPLOYEE EVALUATION REPORT

SECTION VII Summary Evaluation and Status Recommendation

CHECK APPROPRIATE BOX

Exceeds Expectation ☐ Meets Expectation ☐ Requires Improvement ☐ Unsatisfactory ☐ Termination Recommended ☐	Comments:

Supervisor's Signature _____ Position _____ Date _____

EMPLOYEE: I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement.

Employee's Signature _____ Date _____

THESE FACTOR DEFINITIONS PERTAIN TO ITEMS ON PAGE 1

FACTOR DEFINITION
Refers to the Efficient Completion of Assigned Job Tasks

QUALITY OF WORK:
With accuracy and with dependability.

KNOWLEDGE OF WORK:
The understanding of specific job requirements necessary for satisfactory job performance.

OPERATION AND CARE OF EQUIPMENT:
Refers to knowledge of and effort made to properly utilize materials for their most efficient use.

SAFETY PRACTICES:
Refers to the attempt to carry out job requirements considering the safety of self and others: Participating in Required Safety Programs. COMPLETE WHEN APPLICABLE.

ATTENDANCE:
Faithful adherence to hours and days of assigned work.

APPEARANCE:
Appropriateness of dress on the job.

PUBLIC RELATIONS:
Courteous and helpful attention given to other people and an awareness of representing a Public Service Organization.

PUPIL RELATIONS:
Satisfactory relationship with students while on the job.

STAFF RELATIONS:
Maintaining a satisfactory working relationship with other employees and demonstrating a willingness to work within a group approach to achieve efficient operation.

ADAPTABILITY:
The ability to adjust without difficulty to new and changing conditions.

INITIATIVE:
The effort made to attain prescribed goals and respond with minimum direction to new demands and a willingness to accept responsibility or take action not required by job description.

DEPENDABILITY:
The ability to do required jobs well with a minimum of supervision.